

SCHWAB ADVISOR MOBILE CONNECT RELEASE NOTES

VERSION 3.0

RELEASED DATE

- August 12, 2015

ENHANCEMENTS

- **About Us** – New branded marketing page where you can tell your firm’s story and promote existing content from your firm’s website or other sources at your discretion
 - Supports images that are .jpg or .png format, up to 1MB, and 768–1000 wide by 300–450 high
 - Support rich text content up to 32,000 characters
 - Supports hyperlinks
 - Replaces existing “Contact Us” page
 - Available for existing and prospective clients
- **Our Insights** – New feature helps you engage current and prospective clients by creating and publishing articles that convey your firm’s perspective and highlights
 - Supports up to 100 active articles
 - Ability to archive older articles
 - Replaces existing “News” page
 - Available for existing and prospective clients
- **Offices** – New feature allows current and prospective clients to easily locate your office, or if you have multiple locations, the office nearest to them
 - Supports multiple office locations
 - Displays summary and detailed information
 - Clients can search for locations and select their favorite
 - Replaces existing “Contact Us” page
 - Available for existing and prospective clients
- **Team** – New feature allows current and prospective clients to easily access contact information and directly communicate with you and your staff
 - Displays summary information of team members for each office with the ability to obtain more details
 - Clients can search for team members and select their favorite
 - Supports images that are .jpg or .png format, up to 1MB, and 80–120 wide by 80–120 high
 - Supports LinkedIn, Facebook, and Twitter links
 - Available for existing and prospective clients
- **Help** - Allows clients to easily contact their Advisor’s support team
 - Provides support contact information including name, phone, email, and support website

RESOLVED ISSUES

- Inability to log in using Android device with Lollipop release.

UNRESOLVED ISSUES

- All know issues are resolved.

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